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13th Annual Senior Summit

September 9-11, 2025

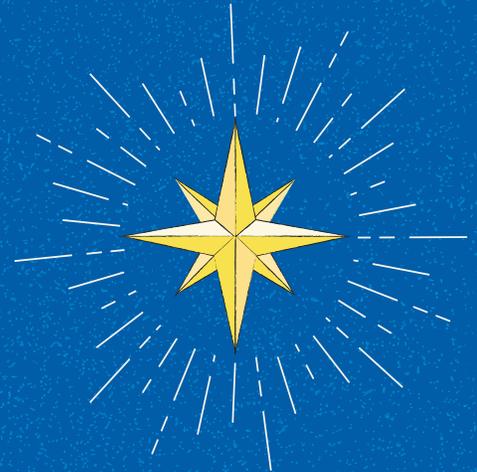
Pechanga Resort Casino, Temecula, CA



**SENIOR
SUMMIT**

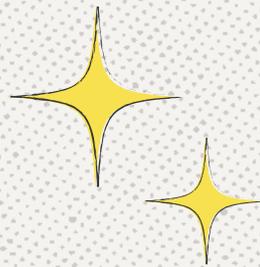
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Welcome To The 2025 Senior Summit

Hello Everyone,

Welcome back to the beautiful Pechanga Conference Center! Whether you're a familiar face or joining us for the very first time, we're so glad you're here. Each year brings new energy, fresh ideas, and, of course, a little bit of that "three-ring circus" spirit that makes this conference such a unique and lively experience.

A special thank you goes out to our Platinum Partners. Your continued support helps us bring forward the most current information and meaningful programming, and we couldn't do it without you!

Over the next three days, you'll find a full agenda of sessions, discussions, and opportunities to connect. We're confident you'll walk away with new insights, lasting connections, and plenty of inspiration to carry back to your business.

We'd also love to hear from you! Comment boxes are located at the back of the room—please share your thoughts. While constructive feedback is always welcome, let's keep the spirit positive. After all, this week is about learning, growth, and a little fun along the way. So, let's get started and make the most of our time together!

With gratitude and excitement,
Your Conference Co-Chairs



Yolanda Webb, CHRS
CAHIP - Inland Empire Co-Chair



Maggie Stedt, CSA, LPRT
CAHIP - Orange County Co-Chair



Ricky Haisha, LUTCF
CAHIP - San Diego Co-Chair

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Senior Summit

Tuesday, September 9, 2025 – Day 1

7:30 to 9:30 AM	Sunrise Continental Breakfast Breakfast Partner: AgentMethods	Summit A, B, C Foyers
8:00 AM to 5:00 PM	Registration	Summit Registration A, B
9:00 to 9:25 AM	Senior Summit Welcome, Opening Comments, Introduction of Dignitaries Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	Summit C
Education Sessions (Choose One)		
9:30 to 10:30 AM	OBBBA Budget Bill: Navigating the New Benefits Landscape [CE: 392809] Speaker: Paul Roberts, Word & Brown	Summit A
	Cyber Risk, Cybersecurity & Insurance [CE: 390236] (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speakers: Adriana Mendieta, Tech Coordinator Cybersecurity Insurance Solutions, and Carl Grifka, SingerLewak	Summit B
	The Fraud Squad and You [CE: 392640] (This course <i>satisfies</i> the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
10:30 to 11:15 AM	Platinum Ribbon Partner Welcome: AGA, Alignment Health Plan, and SCAN Health Plan	
11:00 to 11:30 AM	Morning Coffee Coffee Partner: Primary Care Associates of CA	Summit A, B, C Foyers
11:20 AM to 12:20 PM	Heard on the Street: Our Wins at NABIP, Medicare Legislative Outlook and Challenges Panelists: Calvin Bagley, Nuvo Health; Faith Borges, Public Policy Partnership; Amanda Brewton, Medicare Answers Now; Dwane McFerrin, Senior Market Sales, and Nick Uehlecke, Todd Strategy Group	Summit C
12:30 to 1:50 PM	Lunch – Plated / Table Service Lunch Partner: Senior Market Sales	Summit D, E
12:30 to 5:00 PM	Exhibit Hall Open	Grand Ballroom
2:00 to 2:50 PM	Our Wins with NABIP and CAHIP Panelists: Calvin Bagley, Nuvo Health; Faith Borges, Public Policy Partnership; Chalen Jackson, Senior Marketing Specialists; Dawn McFarland, CAHIP President, and Susan Rider, NABIP President	Summit C
3:30 to 3:50 PM	Grab a Snack Break Partner: L A Care Health Plan	Summit A, B, C Foyers
Education Sessions (Choose One)		
4:00 to 5:00 PM	Employer Benefits vs Medicare Benefits, Should Your Employees Stay or Should They Go? [CE: 356191] Speakers: Mary King and David Garcia, Warner Pacific Insurance Services	Summit A
	Agency Evolution: Build Smart, Scale Strategically, Exit Strong [CE: 392711] Speaker: Tim Kanter, Inszone Insurance Services	Summit B
	The Aging Population: Ethical Sales and Service [CE: 392733] (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
5:00 PM	Dinner on Your Own	

THE MARKETING RESOURCE EDGE.

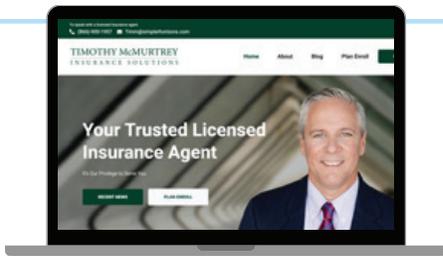


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Wednesday, September 10, 2025 – Day 2

7:00 AM to 12 PM	Registration	Summit Registration A, B
7:30 to 9:30 AM	American Morning Breakfast Buffet Breakfast Partner: AltaMed	Summit A, B, C Foyers
7:30 AM to 12:30 PM	Exhibit Hall Open	Grand Ballroom
Education Sessions (Choose One)		
8:30 to 9:30 AM	AI: From Concept to Reality Speaker: Korey Ashton, Kizen	Summit A
	Increase Your Revenue thru the Employee Benefits Market Speakers: Maura Zamarripa and Karen De Leon, Amwins Connect	Summit B
	Doing Right and Selling Right is Ethical [CE: 392707] (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
9:35 to 9:40 AM	Welcome and Orders of the Day Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	Summit C
9:40 to 10:15 AM	Medicare Legislative Outlook & Challenges Panelists: Calvin Bagley, Nuvo Health; Amanda Brewton, Medicare Answers Now; Susan Rider, NABIP President, and Nick Uehlecke, Todd Strategy Group	Summit C
10:20 to 10:25 AM	Membership and PAC Minute	Summit C
10:30 to 10:55 AM	E & O Panel Discussion Panelists: To Be Announced	
11:00 to 11:25 AM	PDP Sales Dilemma: To Sell or Not to Sell, that is the Question Panelists: Dr. Ali Farrokhroo, PharmD, MBA, Alignment Health Plan; Austin Felch, AGA; Matt Fletcher, MF Insurance Services; Tamie Mongold, Shop N Health Insurance Agency, and Henry Romero, HRBC Insurance	Summit C
11:00 to 11:30 AM	Morning Coffee Coffee Partner: Aetna Medicare	Summit A, B, C Foyers
11:30 to 11:50 AM	Washington, DC Update: An Insider Conversation Speaker: Nick Uehlecke, Todd Strategy Group	Summit C
11:55 AM to 12:30 PM	Mentalist Program Mentalist: Michael Gutenplan	Summit C
12:30 to 1:50 PM	Exhibit Hall Closed	Grand Ballroom
12:30 to 1:50 PM	Lunch – Plated / Table Service Lunch Partner: Blue Zones Health	Summit D, E
2:00 to 5:00 PM	Exhibit Hall Open	Grand Ballroom
2:00 to 2:45 PM	The Future of Marketing Speaker: Gabrielle Rascon, AGA	Summit C
3:00 to 3:15 PM	Energizer Break Break Partner: Enable Dental	Summit A, B, C Foyers
3:00 to 3:50 PM	How Agents and Providers Can Work Together: A Panel Presentation Panelists: Dr. Juan Chiriboga, MD, FAAFP, AltaMed; Donna McKeehan, Anthem Blue Cross Medicare; Jill Selby, Regal Medical Group; Leslie Tribble, Alignment Health Plan	Summit C
Education Sessions (Choose One)		
4:00 to 5:00 PM	Digital Marketing Unlocked: Turning Chaos into a Clear Plan Speaker: Danyi Galligan, AgencyBloc	Summit A
	Technology for the Medicare Agent/Agency Speakers: Henry and Nico Romero, HRBC Insurance Services	Summit B
	Help Your Clients Live Better, Longer with Blue Zones Health Speakers: Alex Barajas, Dr. Dipika Pandit, MD, MPH, and Joan Varini	Summit C
5:00 PM	Dinner on Own	



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Thursday, September 11, 2025 – Day 3

7:30 AM to 12:00 PM	Exhibit Hall Open	Grand Ballroom
8:00 to 10:00 AM	Registration	Summit Registration A, B
8:00 to 10:00 AM	Santa Rosa Breakfast Buffet Breakfast Partner: Champion Health Plan	Summit A, B, C Foyers
8:50 to 9:00 AM	Welcome and Orders of Day Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	
9:00 to 9:40 AM	2026 Alignment Health Plan First Look and Product Overview	
9:45 to 10:25 AM	2026 SCAN Health Plan First Look and Product Overview	
10:30 to 11:10 AM	2026 Molina Healthcare and Central Health Plan First Look and Product Overview	
10:30 to 11:15 AM	Morning Coffee Coffee Partner: Quotit	Summit A, B, C Foyers
11:15 to 11:55 AM	2026 Humana First Look and Product Overview	
12:00 PM	Exhibit Hall Closed	Grand Ballroom
12:00 to 12:50 PM	Lunch – Plated / Table Service Lunch Partner: Kizen	Summit D, E
1:00 to 1:40 PM	2026 Wellcare First Look and Product Overview	
1:45 to 2:15 PM	2026 Champion Health Plan First Look and Product Overview	
2:20 to 2:50 PM	2026 Aetna Medicare First Look and Product Overview	
2:40 to 3:10 PM	Sports Break Break Partner: The Brokerage	Summit A, B, C Foyers
3:00 to 3:25 PM	2026 UnitedHealthcare First Look and Product Overview	
3:30 to 3:55 PM	2026 Anthem Blue Cross Medicare First Look and Product Overview	
4:00 to 4:25 PM	2026 Blue Shield of CA First Look and Product Overview	
4:30 to 5:00 PM	Closing Statements, Membership Results, Awards & Grand Prize Raffle Announcement Grand Prize Partner Presentation: Regal Medical Group, Lakeside Community Healthcare, ADOC Medical Group	
5:00 PM	The End – Thank You for Attending the Senior Summit – See You in 2026!	

ALL DAY 3 SESSIONS ARE HELD IN SUMMIT C

We're honored to join you at the 2025 Senior Summit!



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Wednesday's Special Performance



The Center Ring: A Mind-Blowing Performance

Michael Gutenplan is a third-generation psychic and master mentalist with over 25 years of professional experience. Known for his energy, wit, and dazzling style, he has performed in 24 countries and 49 states, entertained Fortune 500 companies and private clubs, and been featured on television and Off-Broadway. Recognized as one of the top entertainers in his field, Michael's accolades include The New York Times' praise for his show *Extraordinary Deceptions* and *Boardroom Magazine's* "Best Entertainment" award. His performances are designed to engage, amaze, and be genuinely unforgettable.



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General and Breakout Session Speakers



Korey Ashton is the Vice President of Growth at Kizen, where she drives strategy across customer acquisition, partnerships, and go-to-market initiatives. With more than 16 years of experience in insurance and technology, she has led startups, enterprise teams, and her own agency through growth and transformation. She is also the founder of The Ellevate Foundation, a nonprofit supporting women in insurance and finance through mentorship, scholarships, and leadership development. A frequent national speaker, she is passionate about the role of technology in modernizing and scaling insurance businesses.



Calvin Bagley is the founder of Nuvo Health, Nevada's largest Medicare Field Marketing Organization, and the creator of ventures including PlanFit, Nuvo Wealth, MedicareHub, and The Medicare Store—helping more than 60,000 individuals make smarter healthcare decisions. A passionate advocate for Medicare transparency and the vital role of independent brokers, Calvin is also an investor in healthcare innovation and a writer. His upcoming memoir, *Hiding from the School Bus (2025)*, shares a powerful story of resilience, faith, and breaking cycles, inspiring audiences to navigate both healthcare and life with clarity and courage.



Alejandro (Alex) Barajas is Vitality Lead with Blue Zones Health. He has had more than a decade of success driving growth, engagement, and expansion across Southern California. Alex is recognized for building accountable teams, fostering trusted FMO and broker partnerships, and activating regional strategies that deliver measurable ROI. At the 2025 Senior Summit, he introduced the Blue Zones Health Preferred Broker Program and outlined the advantages of enrolling clients with a Blue Zones Health provider.



Faith Borges is a seasoned lobbyist with more than a decade of experience advocating before the California Legislature and regulatory agencies. She represents clients across insurance, liability, and business management, from small businesses to Fortune 500 companies. An active member of key Sacramento coalitions, Faith has a strong record of shaping legislation on healthcare, transportation, privacy, housing, and more, ensuring her clients' interests are protected in complex policy environments.



Amanda Brewton is the founder of Cleveland-based FMO Medicare Answers Now and a nationally recognized advocate for brokers and Medicare beneficiaries. With nearly 20 years of NABIP leadership and recent honors, including the NABIP Legislative Award – 2025 Momentum Maker and Educator of the Year, she is known for advancing education, mentorship, and advocacy in the industry. Amanda created two national conferences—Ms. Medicare and Medicare & Margaritas—and serves as Partner & Creative Director for the Agent Symposium at Medicarians, the nation's largest senior health and AgeTech conference.



Dr. Juan Chiriboga, MD, FFAFP is Site Medical Director of AltaMed's Viva Gold Program in Los Angeles. A board-certified family physician, he specializes in primary care, hospital medicine, and HIV/AIDS care, with a focus on underserved geriatric patients. Formerly Associate Program Director at Keck Medicine of USC, he is fluent in English and Spanish and recognized for his leadership, teaching, and commitment to community health.



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General and Breakout Session Speakers



Karen DeLeon, Regional Sales Manager at Amwins Connect, has nearly 30 years of experience in the insurance industry. She began her career on the Small Group side and expanded her expertise to include individual and Family Plans as well as Medicare. Karen spent 15 years specializing in Medicare on the carrier side, gaining in-depth knowledge and insight into the evolving landscape. Although she now works on the General Agency (GA) side with a focus on Small Group, she has continued to stay up to date with all Medicare changes and trends.



Ali Reza Farrokhroo, Pharm.D., MBA, Chief Pharmacy Officer, is a pharmacy executive with 20 years of experience in managed care, technology, and healthcare quality. As Chief Pharmacy Officer, he oversees multi-billion-dollar drug spend, formulary design, and PBM partnerships and has led his organization to consecutive 5-Star Part D ratings. He has received national recognition from PQA and PBMI and is a frequent speaker at conferences, including AHIP and PBMI. Ali has also held leadership roles with APhA, PQA, and AMCP.



Austin Felch is Vice President of Operations at Applied General Agency, Inc. (AGA), where he oversees and optimizes company operations with a focus on efficiency and strategic alignment. Since joining AGA in 2019, Austin has leveraged his extensive Medicare industry experience to run a national compliance program and support agents and agencies in developing compliant Medicare marketing strategies.



Matt Fletcher is a licensed independent health insurance agent specializing in Medicare Advantage, Prescription Drug, and Medicare Supplement plans. Certified with many top carriers, he helps clients navigate their options with clarity and confidence, ensuring they find the coverage that fits their healthcare needs and budget.

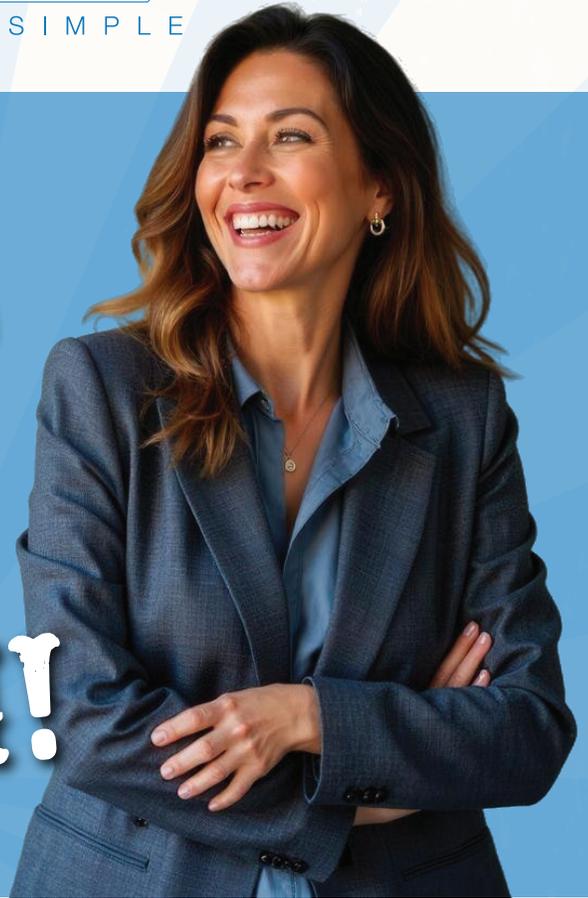


Dyani Galligan is a Senior Product Director at AgencyBloc, leading the development and launch of Engage+, the company's marketing solution built specifically for the insurance industry. She played a key role in bringing Engage+ to market, aligning product strategy with the unique needs of health, benefits, and senior-focused agencies. Dyani works cross-functionally to drive product improvements that empower agencies to attract, engage, and retain clients more effectively. With a passion for user-centric innovation and a deep understanding of insurtech, she focuses on building tools that help agencies grow smarter through streamlined, impactful marketing.



David Garcia is a Senior Medicare Sales Consultant at Warner Pacific Insurance Services and Ventura County chapter President for CAHIP. Since beginning his insurance career in 1998, David has helped agents navigate the Senior market by identifying the right Medicare solutions and providing tools to stay compliant. Passionate about education and community engagement, he also serves as a CrossFit L2 trainer and coach in Newbury Park, California.

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General and Breakout Session Speakers



Carl Grifka, PMP, CISA, CISM, CISSP, CDPSE at SingerLewak, specializes in internal audit, governance, risk assessments, SOX compliance, IT audit, and SOC reporting across industries, including technology, life sciences, manufacturing, and financial services. A former CFO and lead internal auditor for Fortune 100 companies, Carl brings extensive experience in business continuity, disaster recovery, and control design. He holds a B.A. in Accounting from Michigan State University, an M.S. in Finance from the University of Michigan–Dearborn, and serves as Secretary for ISACA LA.



Chalen Jackson is a Key Accounts Specialist and Compliance Officer with Senior Marketing Specialists, helping top-performing agents and agencies grow strategically while staying compliant. A recognized industry speaker and writer, Chalen serves as President of Missouri NABIP, sits on NABIP’s National Medicare Advisory Group, and co-hosts the Medicare Industry Insider Podcast. When not guiding agents or navigating regulations, Chalen enjoys hiking and fishing with his wife, Julia, and son, Theodore, in Central Missouri.



Bobbi Kaelin has been with PayPro Administrators since 1991, expanding her expertise from client services and marketing to compliance, plan design, technical issues, and broker services. A certified healthcare reform specialist and CDHC professional, she has trained insurance agents, brokers, school districts, municipalities, and nonprofits on HIPAA, ERISA, plan design, and compliance, including serving as a Covered California instructor. Active in the industry, Bobbi has held leadership roles with the Los Angeles Association of Health Underwriters, including President in 2018, and currently serves as Treasurer for EBPA Los Angeles. She resides in downtown Los Angeles and is actively involved in community outreach.



Tim Kanter is a Senior Benefits Insurance Specialist and Branch Manager at Inszone Insurance Services, bringing over 30 years of experience in insurance, underwriting, and client-focused solutions. A past president of CAHIP and award-winning leader, Tim helps individuals and businesses find tailored insurance plans while supporting causes like the Free Wheelchair Mission and Children’s Hunger Fund. A California native, he lives in Ventura County with his family and enjoys backpacking, travel adventures, and practicing martial arts as a black belt in To-Shin Do.



Mary King has been with Warner Pacific for over 20 years, and with a major carrier partner for 7 years before joining Warner Pacific. Having an attraction to escalated or unusual issues in the Small Group segment, Mary is always ready to assist with finding a solution or the correct answer to a difficult question. Mary is the Lead Executive Sales Support Specialist at Warner Pacific.

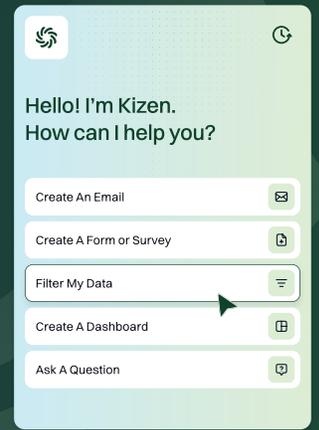
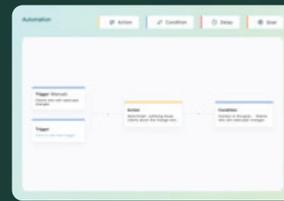


Dawn McFarland is the founder of M & M Benefit Solutions Insurance Services and currently serves as President of the California Agents & Health Insurance Professionals (CAHIP). Passionate about helping individuals navigate Medicare and the senior market, she is a trusted resource for agents, HR professionals, and anyone seeking guidance on retirement healthcare decisions, assisting people to make informed choices that reduce costs while building long-term partnerships.



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General and Breakout Session Speakers



Dwane McFerrin, CLU[®], CFP[®], RHU[®], CLTC[®], LLIF, is Senior Vice President, Med Solutions at Senior Market Sales[®] (SMS), overseeing Medicare product strategy, carrier relationships, and a team supporting over 725,000 annual Medicare-related applications. With more than 30 years in executive insurance roles, he has led sales, marketing, and client development for top carriers, including Mutual of Omaha and Physicians Mutual. A recognized industry leader, Dwane has earned the Omaha AHU Underwriter of the Year Award, served on NABIP committees and task forces, and is a founding member of the NAIFA Medicare Collective. He holds a Master's in Industrial/Organizational Psychology from the University of Nebraska at Omaha and a B.A. from Central College.



Donna McKeehan has been with Anthem for 27 years. Initially working as an enrollment manager in the Commercial market, she has been a Medicare Regional Sales Manager for the last 9 years. As an RSM, Donna's primary focus includes working with our broker partners on business and marketing strategies, understanding and selling the Anthem Medicare portfolio, and identifying opportunities to achieve sales growth. She loves playing UNO, listening to Latin music in various genres (she speaks Spanish fluently!), and going to the movies with her kids.



Adriana Mendieta is the founder of Tech Coordinator Cyber Insurance Solutions and is a certified cyber insurance specialist licensed in 15 states. An experienced independent insurance agent since 2005, Adriana has been recognized as Sales Coordinator of the Year multiple times at Colonial Life and achieved Lead Producers Round Table (LPRT) status with NABIP. She specializes in cyber insurance, education, and risk management, having authored and presented CE courses, community workshops, and served on the ISSA Los Angeles board to help businesses and professionals navigate cyber risk.



Tamie Mongold is the principal owner of Shop N Health Insurance Agency, specializing in Medicare products and health insurance. After a career as an ultrasound technician, a personal experience with workers' compensation inspired her to become an independent advocate for clients navigating Medicare, Social Security, and prescription programs. Over the past 10 years, she has built a book of over 800 clients, mentored 50 agents, and is dedicated to helping seniors find the best plans while teaching new agents to do the same.



Dipika Pandit, MD, MPH, is a Lifestyle Medicine Physician with Blue Zones Health. Dr. Pandit is passionate about addressing the root causes of illness and helping people achieve their best health through prevention, treatment, and natural disease reversal. She has practiced as a lifestyle medicine physician in a primary care setting since 2017.

Board-certified in Family Medicine, Preventive Medicine, and Lifestyle Medicine, Dr. Pandit's mission is to improve population health in the United States and beyond. She works with individuals, families, and communities to: Increase vitality and quality of life through optimized lifestyle choices, promote empowerment in health decision-making, and provide a holistic model of care that addresses mental, social, emotional, spiritual, and physical well-being.

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General and Breakout Session Speakers



Gabrielle Rascon is the Marketing Director at Applied General Agency (AGA), where she leads national campaigns that support agents and agency partners. With expertise in digital advertising, omnichannel lead development, and AI-driven marketing strategies, she delivers measurable results that drive growth and scalability. Her background in healthcare marketing and collaboration with providers, medical groups, and carriers gives her a unique perspective on aligning organizations for success in the Medicare insurance space.



Susan Rider is National President of NABIP, advocating for innovation, compliance, and leadership in the health benefits industry. She also serves on NAPEO's Government Affairs Committee and is a Director of Human Resources & Compliance at Human Capital Concepts, a OneDigital company, guiding businesses through complex employee lifecycle and regulatory challenges. An adjunct faculty member at Purdue University, Susan holds a Master's in Strategic Leadership & Design and is a second-year law student at Purdue Global. She is a certified instructor and course designer for NABIP, helping brokers and HR leaders elevate their expertise.



Paul Roberts is Senior Director of Education and Market Development at Word & Brown, where he leads educational initiatives and oversees the WBCompliance team in California and Nevada. With more than 17 years of industry experience, Paul is a recognized leader in health insurance education, a frequent national speaker, and the innovator of NABIP's ACA Certification course, ACA and Beyond: A Modern Look at Employee Benefits.



Henry Romero, Founder and President of HRBC, brings over 25 years of industry experience and a proven record of driving company growth since 2005. A former Kaiser Permanente executive, he specializes in designing health insurance operations to meet client needs. A U.S. Marine Corps veteran, Henry applies his leadership and team-building skills to guide HRBC's customer-focused mission.



Nico Romero is a local Medicare insurance broker dedicated to helping clients navigate Medicare with integrity and transparency. Using a commonsense approach, he listens carefully to each client's needs before recommending Medicare Advantage, Part D, or Supplement plans. Nico believes that an educated client is a confident client and looks forward to assisting with all things Medicare.



Jill Selby brings 35+ years of healthcare experience with expertise in Medicare Advantage growth. Formerly Senior Vice President at SCAN Health Plan, she led product innovation and market expansion for nearly 300,000 members across five states. She now serves as Senior Vice President of Marketing at Regal Medical Group, overseeing outreach to 600,000 members across Southern California and driving growth through strategic partnerships and sales initiatives.



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General and Breakout Session Speakers



Leslie Tribble serves as Vice President and General Manager of Network Performance at Alignment Health, where she leads strategies to optimize provider partnerships and drive operational excellence. She is passionate about supporting providers with the tools and resources they need to deliver high-quality care. With members at the center of all she does, she is committed to driving better outcomes and value across the healthcare system.



Nicholas Uehlecke joined Todd Strategy Group in 2021. A former Senior Advisor at HHS, he worked on Medicare, Medicaid, health care reform, regulatory relief, and value-based care initiatives, including the Advancing American Kidney Health Initiative and COVID-19 Provider Relief Fund. He also served eight years on the House Ways and Means Committee and previously worked as a policy analyst at the Marwood Group.



Joan Varini is Well-Being Advisor for Blue Zones Health. As a valued part of Blue Zones Health membership, clients are connected with a Well-Being Advisor who partners closely with both the patient and their physician to support overall health and well-being. At the 2025 Senior Summit, Joan shared a preview of the personalized support your clients can expect as Blue Zones Health members.



Maura Zamarripa is a Regional Sales Manager at Amwins Connect with nearly 40 years of experience in the healthcare industry. Specializing in employee benefits, she is passionate about strategizing with agents to bring the best solutions for their clients. Maura has developed campaigns for agents/agencies to grow their Employee Benefits division. Her experience in the Individual, Small Group, and Mid-Market has given her the insights, leadership, and success to bring to any agent.

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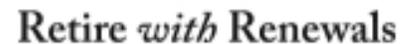
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Aetna Medicare	49
AGA	57 & 58
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Clever Care Health Plan	37
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Dickerson Insurance Services, an Alera Group Company	38
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HowardCRM	20
HRBC Insurance Servces	1 & 2
Humana, Inc.	65 & 66
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Medi-Cal Consulting Services	29
Molina Healthcare / Central Medicare Health Plan	63 & 64
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Company	Table #
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Traci's Insurance Services	5
UnitedHealthcare / AARP Medicare Supplemental	27 & 28
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- » Staying up to date on important issues that affect your clients and your business.
- » Staying compliant.
- » Furthering your professional development by staying educated and getting appropriate certifications.
- » Networking with your peers and learning best practices.
- » Fighting to be treated fairly for the services you provide.

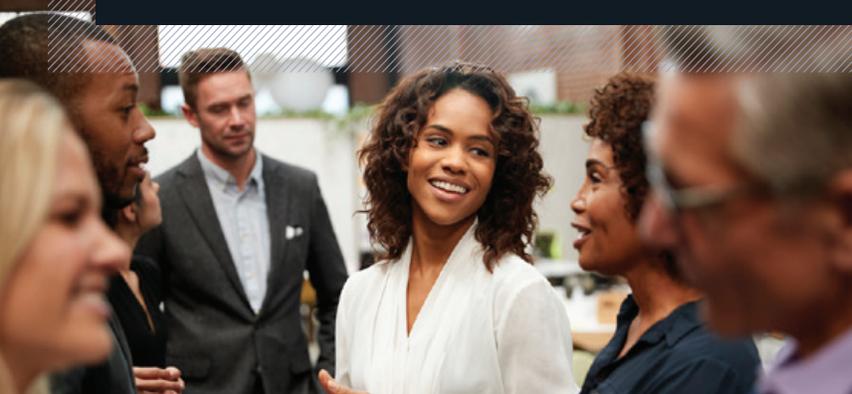


The National Association of Benefits and Insurance Professionals (NABIP) is your solution to all of these challenges, and more.

With what's happening in the world today, more than ever you need to have a resource like NABIP! It's important for you to be a part of a professional association that influences legislation and regulations that will safeguard and enhance your career.

NABIP is the association that has your back and will continue to fight for you and your clients.

Without NABIP, what will you do? Who will help you survive and thrive?



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For more information, email membership@nabip.org or call **202-552-5060** (Option 8) or JOIN TODAY at [NABIP.org/join](https://www.nabip.org/join)



NABIP Works for YOU because Medicare Matters!

Current Medicare Battles

- CMS marketing rules and commission issues - legislation pending to eliminate the scope of appointment form and address commission issues.
- HSAs - NABIP is working on an HSA amendment allowing working individuals more flexibility to contribute to an HSA beyond age 65.

Current Medicare Successes

NABIP has been instrumental in helping accomplish the following legislative and regulatory victories.

- Repealed disenrollment period and restored open-enrollment period
- Dropped Medicare Marketing Guidelines 120.4.4
- Bipartisan legislation to address COBRA as creditable coverage and end penalty
- Bipartisan legislation to address observation status
- Removed CMS rules to impose restrictions on Medicare Advantage and Part D choices for seniors
- CMS withdrew Part D rules and rescinded Medicare Advantage marketing restrictions on agents
- Extended value-based design for Medicare Advantage
- HSAs into Medicare Modernization ACT

NABIP Resources

- Medicare newsletter and certification course
- Top-notch lobbying efforts that advocate for agents/brokers who sell in the Medicare market
- Excellent working relationship with CMS that allows us to provide you with timely news and updates
- CMS-approved Medicare marketing materials
- Guidelines and templates to run an effective Medicare Summit

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NABIP Advocates for You

The National Association of Benefits and Insurance Professionals (NABIP) fights for the interests of its members at the state and federal levels of government to advance the health insurance industry and promote affordable and responsible private health insurance market solutions.

Formerly the National Association of Health Underwriters (NAHU), the association has a lengthy history defined by its advocacy prowess and commitment to advancing the interests of its members. Today, the benefits and insurance industry is different from what it was two decades ago—and is continuously changing. With our new name, the association can evolve alongside the industry and anticipate new dynamics while reaffirming itself as the industry's leading voice for years to come.

Why is our advocacy important?

As the issues encompassing our membership diversify and increase, our advocacy efforts remain a top priority for the association. We continue to position the interests of our members at the forefront with critical policymakers and opinion shapers. NABIP headquarters, located in the heart of Washington DC, and our presence in all 50 states, allow us to keep a finger on the pulse of legislative efforts and shape the issues that matter to our members and their clients.

How do we conduct advocacy efforts?



NABIP meets regularly with members of the administration, including domestic policy staff at the White House, the secretary of Health and Human Services, the head of healthcare.gov and officials at the Department of Treasury and Department of Labor. Additionally, NABIP has continued the legacy of its premier grassroots program, Operation Shout, to put you and your clients in touch with members of Congress – ensuring our engagement with Capitol Hill audiences remains consistent and impactful.



NABIP's Legislative Council, a coalition of representatives from across NABIP's regions, is primarily responsible for developing the formal positions that guide our legislative strategy. We have secured our position as an industry leader by staying true to our core mission and values. As NABIP, we will continue to place a premium on advocacy and utilize the Legislative Council to guide future strategies.



NABIP's PAC remains dedicated to its original purpose: maximizing members' political impact by combining and deploying financial support to candidates who are proven champions of our industry. Our PAC engages with lawmakers from both parties to make sure NABIP members' voices are heard. We encourage our members to engage in political expression through our rebranded PAC. In 2021, our PAC helped save consumers more than \$400 billion, and our members have the power to continue our PAC's legacy of success.

A Legacy of Leadership

"NABIP is a trusted resource for Congress and the administration, and the influence we have built over the years allows us to work for our members and their clients on the issues most important to them."

JANET TRAUTWEIN | NABIP CEO

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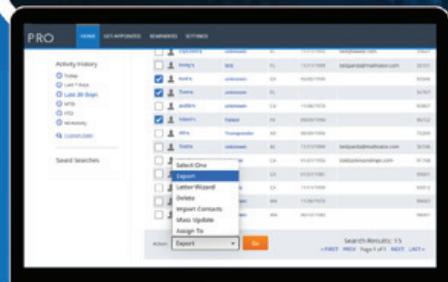
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Why NABIP Is the Right Choice for You

The National Association of Benefits and Insurance Professionals (NABIP) is the leading organization for health insurance and employee benefits professionals. NABIP represents more than 100,000 licensed health insurance agents, brokers, general agents, consultants and benefit professionals through more than 200 chapters across America.

Collectively, we work to ensure all Americans have access to high-quality, affordable healthcare and related benefits. To meet that vital mission, NABIP advances the interests of its members and advocates for sound public policy solutions in Washington DC and state capitals throughout the country.

As the health insurance and benefits landscape has evolved, so has the association. Still, we have remained steadfast in our commitment to our members, providing vast professional-development opportunities and resources to promote excellence, including certification programming, conferences and business-development tools.

Under the recently rebranded moniker NABIP, we are better positioned to serve as trusted advocates for our members and their clients for decades to come. As more professionals join the association, NABIP becomes even stronger.

Shaping the *Future* of Healthcare

Our new tagline reflects NABIP's belief that all Americans should be empowered to make wise healthcare and benefits decisions in order to have access to high-quality, affordable healthcare and related services.



Operation Shout

NABIP's premiere grassroots system allows members to have their voices heard by lawmakers. Operation Shout is an indispensable component of NABIP's overall legislative advocacy efforts.

What We Do

We advocate for affordable and responsible health insurance market solutions to secure the future and stability of our industry.



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